The recent heightened awareness of financial risk and lack of available credit has left many global economies and companies re-evaluating their future short-term and long-term strategies. In the global offshore oil and gas industry, this is expected to result in a number of short-term project delays or deferrals.

Many of the oil majors were less prone to the overall optimism and sanctioning of projects during the high prices of Spring 2008. Consequently, they were more equipped for the months that followed and many maintain relatively positive market positions at present. However, despite this, the overall lack of confidence in the global markets combined with edging on the side of caution has resulted in many operators reducing their projected Capex spend from 2009 onwards. For the Independent operators in particular, this has resulted in the delay of some projects as lack of available financing restricts the level of their progress.

In the emerging market of Asia, the most prominent risk in the current financial conditions is the lack of liquidity in the markets. This essentially sees operators unable to raise the finance to develop fields, a problem which could be made more acute in Asia where many operators are independents. In Australasia, large independent operators have decreased in the Capex spend of the previous five year period. This trend is set to continue, with increasing contribution from a number of the major integrated oil companies, such as ExxonMobil, Chevron and Shell.

Despite these market issues, Asia is still expected to represent the second largest share of the global Capex spend in the forecasted 2009-2013 period. With an estimated capital expenditure (Capex) of over $97 billion through 2009 to 2013, the region is expected to witness an increase of 77% in terms of Capex when compared to the previous five year period.

In Australasia, large independent operators have decreased in the Capex spend of the previous five year period. This trend is set to continue, with increasing contribution from a number of the major integrated oil companies, such as ExxonMobil, Chevron and Shell.

The Australasian offshore market is expected to grow rapidly in terms of capital expenditure, with over a three-fold increase forecasted for the 2009 to 2013 period compared to the previous five year period. ISL forecasts that Australia will have to spend $42 billion over the five year period 2009-2013 period compared to the previous five year period. ISL forecasts that Australia will have to spend $42 billion over the five year period 2009-2013 period compared to the previous five year period.

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**Report Contents**

- **Offshore Asia Pacific Oil & Gas Market Update** is divided into two volumes. The first volume covers Offshore Asia (India, South East Asia & East Asia) and the second volume covers Australasia (Australia, New Zealand and Papua New Guinea). Each volume follows the same structure and format set out below;
- **Summary & Conclusions** Provides an executive overview of the complete market in the region, by sector and by country, with commentary and analysis
- **Global Market Context** reviews the drivers behind the global offshore oil and gas business including such issues as the current credit market turmoil, oil price level and its effect on activity, primary energy consumption, analysis of proved oil and gas reserves and oil and gas production, offshore versus onshore market overview and the major supply constraints facing the industry
- **Sector Analysis & Forecasts** for each sector; fixed platforms, floating production, offshore pipelines and control line analysis is provided by country, type (facility, pipeline, control line) water depth, total platform weights, pipeline material, pipeline diameter and pipeline market segment (Conventional, SURF and Trunk Line)
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- Development Type
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- Date/Year Discovered
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